

What is claimed is:

1. In a software suite for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of data sources and accessible through a single interfacing node operated on a data-packet-network, a transaction module having a displayable summary interface comprising:

an interactive main interface accessible through the summary interface, the main interface for listing new transactions related to registered financial accounts;

an interactive history link embedded in the main interface for providing access to a secondary interface for viewing transaction history;

an interactive menu provided within the main interface for assigning categories to the listed transactions;

an interactive save feature for saving category assignments to the listed transactions;

a interactive bill-payment link provided within the main interface for linking the interface to a bill-payment module; and

an interactive transfer-funds link provided within the summary interface of the module for linking the summary face of the module to a secondary interface for transferring funds from one account to another, characterized in that a user operating the main interface from a remote node having access to the data-packet-network may view all transactions according to option of category, account, and time period.

2. The transaction module of claim 1, wherein the data-packet-network is the Internet network.

3. The transaction module of claim 2, wherein the plurality of data sources are services accessible over the Internet and subscribed to by the operating user.

5 4. The transaction module of claim 3, wherein the accessible services are hosted in file servers addressed on the Internet network.

5. The transaction module of claim 4, wherein the remote node is a personal computer with accessibility to the Internet.

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6. The transaction module of claim 5, wherein the summary, main and secondary interfaces are provided in the form of hyper-text-markup-language.

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7. The transaction module of claim 4, wherein the remote node is a cellular telephone with accessibility to the Internet.

8. The transaction module of claim 4, wherein the remote node is a hand-held computer with accessibility to the Internet.

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9. The transaction module of claim 4, wherein the interactive menu within the main interface contains a selectable list of transaction categories including food and beverage, utilities, home, auto, charitable contribution, and entertainment.

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10. The transaction module of claim 9, wherein the secondary interface invoked from the interactive history link contains a plurality of interactive

11. The transaction module of claim 10, wherein the selectable options  
5 enable viewing transactions by a specific account, a specified timeframe, and  
by a selected category, the options selectable for ordering combinations of  
criteria for producing a transaction view.

13. The transaction module of claim 11, wherein the graphics chart ordered  
and displayed is alterable by changing selection of options within the  
plurality of interactive menus in the secondary interface and refreshing the  
15 interface.

20 a first server node connected to the network, the server node  
providing a service-access-point for accessing users;

25 a plurality of server nodes connected to the network and accessible  
to the second server node, the server node functioning as data sources for  
the data procurement and aggregation; and

a transaction viewing software interface installed on the first server node, the interface accessible to the accessing users connected to the network by respective remote computer nodes, characterized in that users accessing the first server node from the remote computer nodes interact with the transaction viewing interface for the purpose of viewing transactions according to ordered category and graphical presentation option, the transactions entered manually or detected automatically through system update and or user request, the transaction compiled and aggregated by proxy using cooperative functions of the first and second server nodes.

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15. The interactive transaction-viewing system of claim 14, wherein the data-packet-network is the Internet network.

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16. The interactive transaction-viewing system of claim 15, wherein the first server node is a portal server providing a personalized interfaces of the form of hyper-text-markup-language interfaces.

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17. The interactive transaction-viewing system of claim 16, wherein the on-line accounts and services are accessible over the Internet and subscribed to by the accessing users.

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18. The interactive transaction-viewing system of claim 17, wherein the remote computer nodes are personal computers with accessibility to the Internet.

19. The interactive transaction-viewing system of claim 17, wherein the remote computer nodes are cellular telephones with accessibility to Internet.

20. The interactive transaction-viewing system of claim 17, wherein the remote computer nodes are hand-held computers with accessibility to the Internet.

5 21. The interactive transaction-viewing system of claim 17, wherein the second server node stores aggregated data in a connected data repository held externally from the server.

10 22. The interactive transaction-viewing system of claim 21, wherein the transaction-viewing software interface is linked to at least one secondary interface provided in the form of hyper-text-markup-language.

15 23. The transaction viewing system of claim 22, wherein an interactive menu is accessible from within the transaction viewing interface, the menu containing a selectable list of transaction categories including food and beverage, utilities, home, auto, charitable contribution, and entertainment, each category assignable to a selected transaction listed in the interface, the assignments savable to the system.

20 24. The transaction viewing system of claim 23, wherein a secondary interface accessible from interaction in the main interface contains a plurality of interactive menus, the menus containing selectable options for categorical viewing of transaction history.

25 25. The transaction-viewing system of claim 24, wherein the selectable options enable viewing transactions by a specific account, a specified timeframe, and by a selected category, the options selectable for ordering

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combinations of criteria for producing a transaction view, the transaction view comprising an ordered history view.

5 26. The transaction-viewing system of claim 25, further comprising a charting feature associated with the selectable options, the charting feature for rendering a transactional view in the form of a graphics chart.

10 27. The transaction-viewing system of claim 26, wherein the graphics chart ordered and displayed is alterable by changing selection of options within the plurality of interactive menus in the secondary interface and refreshing the interface.

15 28. A method for ordering and viewing transaction data presented in an interactive transaction-viewing interface accessible through a data-packet-network comprising the steps of:

- 20 (a) accessing an interactive transaction-viewing interface from a remote node connected to the network;
- (b) selecting a categorical criteria for viewing transactions from one or more interactive menus accessible through the interface;
- (c) submitting the categorical criteria, the criteria used to calculate and render the transaction data; and
- (d) viewing the resulting display of transaction data.

25 29. The method of claim 28, wherein the data-packet-network is the Internet network.

30. The method of claim 29 wherein in step (a), the interactive transaction-viewing interface is a personalized hyper-text-markup-language interface served by a portal server connected to the network.

5 31. The method of claim 30 wherein in step (a), the remote node is a personal computer with accessibility to the network.

32. The method of claim 29 wherein in step (a), the remote node is a cellular telephone with accessibility to the network.

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33. The method of claim 29 wherein in step (a), the remote node is a hand-held computer with accessibility to the network.

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34. The method of claim 29 wherein in step (b), the categorical criteria for viewing transactions include account, timeframe, and by category including food and beverage, utilities, home, auto, charitable contribution, and entertainment.

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35. The method of claim 34 wherein in step (b), an additional option is presented for ordering a graphic chart according to the selected criteria.

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